

# What's New in Newforma Project Center 11.5

This webinar is designed for users and administrators of Newforma Project Center and will highlight enhancements in Newforma Project Center 11.5.

## TOPICS COVERED

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### Info Exchange

- Personal Transfers
- How to Send, Receive and Manage Personal Transfer
- How to set up users for Personal Transfers

### Global Threshold

- Auto send large files through Info Exchange
- Send via Info Exchange option
- How to set up the global email threshold
- Reply to all from Info Exchange transfers

### Reporting Enhancements

- Field Notes - Added Datasets
- Project Teams – Grouping
- Punch List - Specialized Reports

### Auto Permissions for Mobile Apps and Newforma Project Center

- Adding yourself to my projects/auto add to Project Team
- Adding yourself to Project Team/auto add my projects
- Auto enable activity centers for mobile apps

### Project Extranet Support

- Send via
- Dragging and dropping files
- Manifest file
- How to set up Document Control for extranet sites

## QUESTIONS & ANSWERS

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**Q: Is version 11.5 available right now?**

A: Yes, Newforma Project Center 11.5 is now available. Please have your Administrator request the update from Newforma at [services@Newforma.com](mailto:services@Newforma.com)

**Q: Will we be able to limit the size of the personal transfer boxes and give them an expiration time?**

A: There is not a setting specific to limit the size of personal transfer boxes. Personal Transfers are sent through Info Exchange just like regular transfers. By default they are set to expire in 30 days, this is an option available on the Send Transfer dialog.

**Q: Does the extranet sites also include Apps such as PlanGrid or BuzzSaw?**

A: Any location with a URL, web address or file path can be used.

**Q: So every project I am a team member of goes into my 'My Projects' list, or just the ones that I have NIX access?**

A: A project is added to your My Projects tab only when you add yourself as a team member. If someone else adds you as a team member, the project will not be added to your My Projects tab. This feature is not dependent on having access to Info Exchange.

Q: Is the personal transfer license change cost extra for each user?

A: No, there is no additional charge.

Q: Is the email limit set in Outlook?

A: The Global Threshold is set by a system administrator in the Newforma Project Administration console on the Global Settings tab.

Q: After enabling mobile apps it was mentioned that team members need to be granted access individually, so enable mobile apps enables it for that project and then we have to back and enable it for the users correct?

A: The Setup Mobile Apps, enables the Activity Centers needed from mobile use. Afterwards, each user still needs to be given access to the project on the Info Exchange website.

Q: Is the file folder/personal folders on my server or some chain link server?

A: It is on your Info Exchange server where regular transfers are stored. The difference is, Personal Transfers are managed through MS Outlook.

Q: Adding to the project list, does it happen for anybody in the office that adds themselves?

A: Yes, this is an automatic feature that happens any user when they add themselves to a project. It does not need to be enabled, nor is there a way to disable it.

Q: Is the threshold setting both incoming and outgoing?

A: This setting only affects outgoing emails.

Q: If "Require a transmittal on every outgoing Info Exchange transfer" is checked, does the box that opens differ from the boxes shown in the demonstration?

A: The Send Transfer dialog will still appear to select the project. If the Require Transmittal option is selected for the selected project, the Transmittal dialog will appear populated with all the information from the Send Transfer dialog.

Q: Does Newforma Project Center automatically remove a project that is inactive/dormant from the My Projects list?

A: No, removal of projects in the My Projects tab is managed by the user. There is a Last Accessed column that a user can view to help manage the list of projects in My Projects.

Q: Where does Newforma store the data from personal transfers?

A: The files are stored on the Info Exchange server. The user interface to manage the personal transfers is accessible through the MS Outlook add-in View Personal Transfers dialog.

Q: Is there a way to upload other team members to send transfers if you are not the admin?

A: You can send file transfers to anyone as long as you have their email address. However, you may need to be an admin to add new members to the Project Team.

Q: Will you still be able to add to My Projects without joining the Project Team and vice versa?

A: Yes – the task to Add or Remove from My Projects is still available to manually manage the My Projects list.

Q: I just realized that we have 11.0.14 and this is for 11.5. Do we need to upgrade to get these features that you are talking about?

A: Yes, all features discussed in this webinar require version 11.5.

Q: Can you add yourself to the project team from the Newforma mobile app?

A: No, you cannot add yourself to the project team from the mobile apps. In order to use the mobile apps, the project needs to be on your My Projects tab and you need to be a member of the project team with access to the Info Exchange website.

Q: Is the Auto Add only for the apps?

A: It's not only for the apps, but a primary goal of this new feature is to make use of the mobile apps easier.

Q: Can we bulk Modify many users to allow Personal Transfers in Admin?

A: Yes, multiple users can be selected and modified at once. There are also two new columns for personal transfers that make it easier to see who has the feature enabled.

Q: Can you forward the personal transfer link?

A: Yes, the link can be forwarded to anyone. It's just like any other link to a website.

Q: So if they are already part of the team and have Info Exchange access, nothing further needs to be done, right?

A: Yes, that is correct.

Q: Do we have to upgrade to 11 before going to 11.5?

A: No, you can upgrade to 11.5 from any previous versions.

Q: To use the mobile apps, do you have to run that button every time or is that just a back-check?

A: It is mostly a back-check as these are global settings. However some Activity Centers may have been disabled for various reasons so it's a good idea to click the Setup Mobile Apps link.

Q: What about site visits? Is a similar report also available?

A: We haven't made any changes to default Site Visit reports, however all new reporting options are available to customize the Site Visit reports as desired.

Q: If you don't want to be a part of the Project Team but want the project in your My Projects, is that possible?

A: Yes, the Add to My Projects task is still available to manually manage the My Projects list.

Q: Can you opt out of the Auto Add if you do not want to have all projects as My Projects?

A: No, there is no opt-out but keep in mind, projects are only added to your My Projects list if you add yourself to the Project Team.

Q: If you remove a project from your list, are you also removing yourself from the Project Team, and vice versa?

A: Yes, that is correct.

Q: Is it possible to grant access to Newforma for non-domain users? i.e. 3rd party consultants to make use of project center activities?

A: Not unless they are provided a login to your network. However, they can access any information you share with them on the Info Exchange website.

Q: I add myself to almost every project because I am the Doc Ctrl Admin, but I do not always want EVERY project on the My Projects tab. Will I have to remove each project that I do not want on my short list?

A: You may consider having someone else add you to the Project Team instead. Also consider that you can access the majority of project information even if you are not on the Project Team.

Q: Is there a report for field notes that features images as well?

A: Yes, there is a new specialized report available in 11.5 that contains images – it is called "Field Note Log Report With Images"

Q: If we use the max attachment size setting, do users have to be in the office for the NIX file transfer to work? Or will it work from any internet connection?

A: The Global Threshold setting is invoked when sending email using MS Outlook on your work computer. If you have a laptop and are connected via VPN, it will function the same as if you were in the office.

Q: [How do passwords work for using the upload to extranet sites?](#)

A: If login credentials are required, you will still enter those in at the time of the transfer.

Q: [If the record copy files are stored on the home server, how are they backed up for disaster recovery?](#)

A: A "Record Copy" is not saved during a Personal Transfer. The transfer is stored on the Info Exchange server and backed up with regular transfers. By default, they expire and are deleted after 30 days.